



Consultancy

Request for Proposal

(Salesforce Consultant)

Main Facts Table	
RFQ launch date	19 March 2026
Contract Manager	Maureen McKenna / Susanna Toronyay
Deadline for submission of offers	03 April 2026

Submission of offers to (Maureen.McKenna@globalgirlsfoundation.org, Cc: Procurement@plan-international.org)

1. Background Information on Global Girls Foundation and Plan International

About Global Girls Foundation (GGF):

GGF is a charitable Swiss Foundation and was founded by Plan International. GGF is the philanthropic arm of Plan International and connects and collaborates with global thought leaders and experts to influence social justice for girls. GGF is building and connecting an exclusive group of global changemakers to co-create solutions that advance girls' rights. GGF does this by leveraging Plan's nearly 90 years of experience developing powerful, innovative and impactful solutions for and with girls and young people that can be scaled up quickly and contribute to social, gender, economic and climate justice. GGF aligns its resources, expertise, and networks to amplify the impact and expand the reach of Plan's programmes.

About Plan International:

Plan International is an independent development and humanitarian organisation that advances children's rights and equality for girls. Plan believes in the power and potential of every child. But this is often suppressed by poverty, violence, exclusion and discrimination. And girls are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children's rights from birth until they reach adulthood. And we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national, and global levels using our reach, experience, and knowledge. We have been building powerful partnerships for children for over 85 years and are now active in more than 80 countries.

2. Description & Objectives

GGF has acquired Salesforce CRM to streamline its donor relationship management processes for resource mobilization. GGF is seeking an independent Salesforce CRM consultant to customize its Salesforce CRM in order to tailor the platform to meet the needs of the Foundation. The consultancy will consist of three phases:

1. Phase 1: Planning Workshop

The consultant will conduct a planning workshop during which the consultant will work closely with the GGF staff to understand the needs of the foundation for managing its donor relationship management processes and activities and plan the customization of the CRM based on the needs and outcomes of the workshop.

2. Phase 2: Salesforce Customization

Based on the outcomes of the workshop and the consultant will develop and implement, in close partnership with the Senior Philanthropy Advisor, a workplan and timeline for customizing GGF's CRM system, which may include the following:

- a. Custom objects
- b. Sales/fundraising pipeline configuration
- c. Automation (flows/process builder)
- d. Email templates
- e. Reports and dashboards
- f. Role hierarchy and permissions
- g. Data import
- h. Basic integrations (i.e. email)
- i. Testing

3. Phase 3: Basic Training

GGF will require a training to become accustomed to the tailored, customized platform, its functions, and capabilities.

The first phase and third phase of the project will be conducted in person in Geneva, Switzerland at the Plan International UN Liaison Office. The second phase can be conducted with a hybrid work setting.

3. Users

The users of the Salesforce CRM system will include Global Girls Foundation and Plan International staff (3 – 5 staff total).

4. Deliverables and Timeline

Key Deliverables (all deliverables should be in English)

1. Planning Workshop: Assessing the needs of the Global Girls Foundation for the customization of their Salesforce CRM for donor relationship management processes and activities.
2. Workplan and Timeline: The consultant will deliver a proposed workplan outlining the plan, steps, and timeline for customization and submit it to the Senior Philanthropy Advisor and Managing Director for approval before the customization begins.
3. Customization of Salesforce CRM: The consultant will work closely with the Global Girls Foundation staff to customize the CRM platform, with the GGF staff providing input and supporting testing. The consultant will deliver the customized platform in line with the approved workplan.
4. Training: The consultant will deliver training to the GGF and appropriate Plan International staff to ensure staff understand the functions of the platform and to ensure maximization of the tailored platform.

5. Timeline

The project will take place starting April 13th with some flexibility on the dates.

6. Expected qualifications of consultant

- Salesforce Certified Nonprofit Cloud Consultant / Salesforce Certified Administrator
- Platform Developer 1 and Platform App Builder
- Salesforce Certified Application Architect
- JavaScript Developer 1
- BS in Data Science or similar degree; Master's in Data Science preferred.
- Fluency in English required

7. Contact

Maureen McKenna, Senior Philanthropy Advisor, Global Girls Foundation.

8. List of documents to be submitted with the RFQ

- Detailed response to the ToR
- Proposed timelines
- Cover Letter
- CVs
- Example of previous work
- References
- Detailed budget, including daily fee rates, expenses, etc.

All consultants/applicants are required to agree and adhere to Plan International's Non-Staff Code of Conduct (Annex A)

The consultancy agreement for this opportunity will include an NDA (Non-Disclosure Agreement) Clause.

9. Submission of offers

Please send your application to Global Girls Foundation (Maureen.McKenna@globalgirlsfoundation.org Cc: Procurement@plan-international.org) with "Consultation for Salesforce" in the subject line and including support documents as outlined.

10. Evaluation of offers

Shortlisted suppliers may be invited to discuss their proposals in more detail at GGF's discretion.

GGF, at its sole discretion, will select the successful Proposal.

GGF shall be free to:

- Accept the whole, or part only, of any submission
- Accept none of the proposals
- Republish this Terms of Reference

GGF reserves the right to keep confidential about the circumstances that have been considered for the selection of the offers.

Part of the evaluation process may include a presentation from the supplier.

Women-owned businesses and companies actively engaged or advancing gender equality and women empowerment in the workplace are especially encouraged to apply.

Value for money is very important to GGF and Plan International, as every additional CHF saved is money that we can use on our humanitarian and development work throughout the world.

GGF and Plan International may award multiple contracts, and all contracts will be non-exclusive.

11. Contract & Payment terms

Please note that, if successful, GGF's and Plan International's standard terms of payment are **30 days** after the end of the month of receipt of invoice, or after acceptance of the Goods/Services/Works, if later.

12. Plan International's Ethical & Environmental Statement

The supplier should establish environmental standards and good practices that follow the principles of ISO 14001 Environmental Management Systems, and in particular to ensure compliance with environmental legislation

13. Clarifications

The onus is on the invited individual/companies to ensure that its offer is complete and meets GGF's and Plan International's requirements. Failure to comply with may lead to the offer being rejected. Please therefore ensure that you read this document carefully and answer fully all questions asked.

If you have any queries in relation to your submission, or to any requirements of this RFQ, please email: [<Maureen.McKenna@globalgirlsfoundation.org>](mailto:Maureen.McKenna@globalgirlsfoundation.org)

Thank you for your proposal

